

Intake

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Introduction

The purpose of Intake is to record incoming maltreatment reports and requests for information or services. A worker gathers information about the reason for the contact with the agency and the people involved in order to classify it as a report of maltreatment, a request for information, or a request for service. From there, the Intake is evaluated and an agency response is determined. An Intake workgroup is always closed when completed but it may be used to initiate an Assessment or Case Management workgroup.

Intake workgroups are accessed through an Intake Search. Intake Search includes searching from an Intake Views node, searching from an Intake Searches node, or searching from an Intake Maltreatment Report Searches node.

When a new Assessment or Case Management workgroup is created from an Intake Workgroup, the system copies the following during the set-up process for the new workgroup:

- Intakes without Child Maltreatment Reports copy the following into the New Workgroup:
 - Chronology (Case notes and documentation only)
 - Workgroup Participants
- Intakes with Child Maltreatment Reports copy the following into the New workgroup:
 - Chronology (Case notes and documentation only)
 - Workgroup Participants
 - Child Maltreatment Report
 - Allegations
 - Initial notifications
 - Facility information.
- Intakes with Adult Maltreatment Reports copy the following into the New workgroup:
 - Chronology (Case notes and documentation only)
 - Workgroup Participants
 - Adult Maltreatment Report
 - Description of Incident
 - Allegations
 - Roles
 - Referral

Additional information about Intake Searches can be found in the Intake Searches Tutorial.



For additional information on entering a child or adult maltreatment intake, see the Child Maltreatment Report and/or VA-CEP Complete Navigation modules.

Create a New Intake

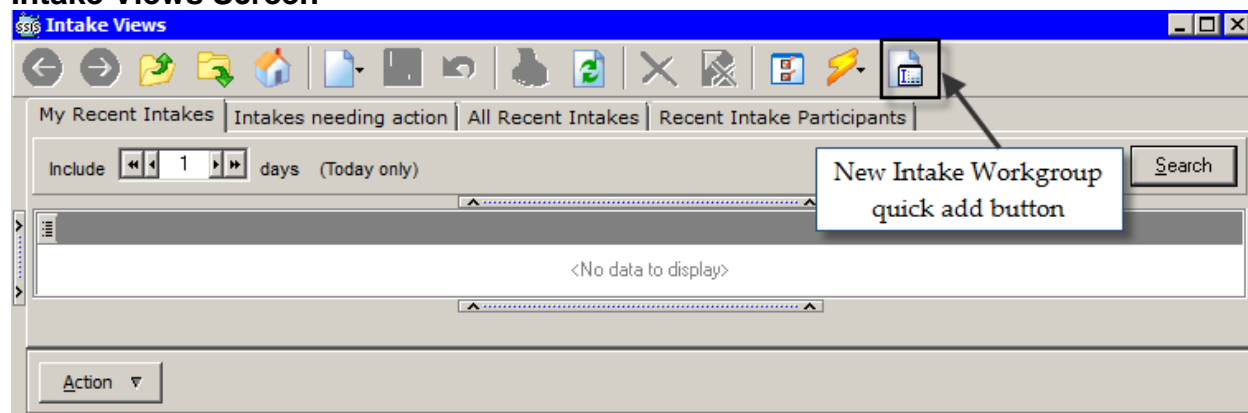
Two ways to create an Intake workgroup:

- Select Searches/Logs from the Windows toolbar and select Intake Search, or
- Click the Intake Search button on the Application toolbar.

Windows and Application Toolbars



Intake Views Screen



To Create A New Intake:



Click the **New Intake Workgroup** quick add button, or access the **Action** menu and select **New Intake Workgroup**. The new Intake workgroup displays.

New Intake Workgroup

Use the New Intake workgroup to enter the information regarding the intake. It is important to document the time and date of intakes. The time entered affects mandatory timeliness guidelines if accepted for assessment or investigation. Dates and times also give a clearer picture of the life of a case, from start to finish.

The Description field is not a mandatory field, but can be used for naming the intake in two ways: Enter free text information, or, once participants have been added, select the name of the participant. Each agency may have a different practice in regard to naming their workgroups. Naming an intake does assist workers in locating a needed intake from the Tree View.

The Start date/time field autofills with the current date and time, and should be edited to document the actual date and time of the contact with the caller/reporter. This is the only required field, and cannot be a future date.


Information is filtered in the Detail section based on what a worker enters in each subsequent field starting with Intake type. For example, an Intake type of Licensing related offers only applicable choices in the Problem field which further narrows the choice under Program.

The Disposition/Close section is not completed until the worker decides what to do with the intake. The Close date/time is required when a Close reason is selected, and cannot be a future date.

Entries made in the Additional Information section vary depending on agency policy. The Description of need tab is where workers enter narrative information from the reporter or screening decisions. Information entered here should be factual and documented just as the reporter reported it. The Comments tab allows workers to enter additional information, such as past services received by the family in another agency. The Staff warning tab allows workers to enter pertinent information for the case worker related to safety issues. Examples include:

- History of domestic violence
- Weapons at the residence
- History of alcohol/drug abuse
- Criminal history convictions
- Aggressive animals at residence
- History of serious mental illness
- Medical/health exposure issues
- History of threatening behaviors towards staff.



Hint: A pencil icon  displays on the tab(s) to indicate that information is present within that tab.

The Workgroup tab displays some of the information asked on the Intake tab. It is primarily used to set workgroup security level restrictions, worker assignments and county of service and financial responsibility.

New Intake Workgroup Screen

To Complete a New Intake Workgroup:



1. Select a date in the **Start date/time** field.
2. Enter the time the intake was received in the **Start date/time** field.
3. Select the method of contact from the **Method** drop-down menu.
4. Select the type of intake from the **Intake type** drop-down menu.
5. Select the reason for the intake from the **Problem** drop-down menu.
6. Select the program from the **Program** drop-down menu.
7. Select the source of information from the **Source** drop-down menu.
8. Click **Save**.

9. Click in the **Caller** field to open the screen in edit mode.
10. Click the **Caller** drop-down menu if the participant has already been added to the intake, or click the **Search** button to search and select a participant.
11. Enter information on the **Description of need**, **Comments** and **Staff warning** tabs, as appropriate.
12. Enter a workgroup description in the **Description** field.
13. Click **Save**.

Add Participants to an Intake Workgroup

Participants are all of the individuals involved in the report or request for services including the person contacting the agency. Participants are both clients and collaterals. Clients are individuals within the household who receive services or are the subject of a report. Collaterals are generally individuals outside the report, not living within the household or not receiving services as part of report. Collaterals include friends, neighbors, grandparents, etc. Professional collaterals can include school social workers, doctors, therapists, etc.

Once all of the clients are entered, add the family's address, phone number, relationships, and any other pertinent information, if necessary.

There are a number of ways to add participants to the intake workgroup:

- From the Caller field, access the Participant screen
- From the Intake node or the Participants folder in the Tree View, access the Action menu, and then select New or Add Existing Client or New or Add Existing Collateral, or
- Click on the Client or Collateral quick add button on the Application toolbar.

Caller Field and Participant Search Button

The screenshot shows a form with a 'Caller' field and a 'Participants Search button'. The 'Caller' field is a drop-down menu with a list of participants. The 'Participants Search button' is a button with a magnifying glass icon. The form also includes a table with columns for Name, SSIS Person #, Age, and Gender.

Name	SSIS Person #	Age	Gender
Harvard, Janice A	115404143	35 years	Female
Harvard, Samantha	195768919	11 years	Female

Using the Participants Search Button:



1. From the **Caller** field, click the **Participants Search** button which opens a new Participants window. The **Participants Search** button enables once the Intake is saved for the first time.

2. Select **New or Add Existing Client** or **New or Add Existing Collateral** to search for the participant.
3. Use the multi-select function (press Ctrl + click) to select multiple participants for an Intake.
4. For clients, search both State and County scope before adding a new client. If the participant is not found, add a **New Client** or **New Collateral**.
5. Once all involved clients and collaterals have been added to the participants list, use the multi-select function to add multiple Participants to the intake and click the **Select** button.
6. All Participants display in the Tree View and in the **Caller** drop-down menu.
7. If not already completed, select the caller from the drop-down menu.

A number of time saving features for selecting existing participants into workgroups include:

- State and County Person Search
- Copying a family grouping of Participants from another agency or SWNDX
- Multi-selecting clients from already established relationships from the local agency database.



For additional information on selecting Participants, see the Person Search module.

Close an Intake Workgroup

Once an intake disposition has been determined, the Intake workgroup is closed.

Intake workgroup close reasons include:

- Open for assessment – Intake complete
- Refer to current workgroup – Intake complete
- Open for case management – Intake complete
- Doesn't qualify
- Other agency responsible
- Resource not available
- Request withdrawn
- No further action needed
- Refer to outside provider – Intake complete.

Close reasons available are based on the type of intake created and the dispositions. Regardless of the close reason, all mandatory fields must be entered and no data clean-up error may exist in order to close the Intake workgroup.

It is also important that the date and time entered into the close date and time field is accurate. An incorrect date and/or time will result in incorrect data reports. For example, in Child Protection Assessment workgroups the Close date and time of the Intake

workgroup must be prior to the recorded Child observation/interview in the Assessment workgroup for the Initial Contact report to calculate the interval correctly.

An Intake workgroup is not editable while closed; however, anyone may add new Case Notes, Documents, or Documentation as needed.

Closed Intake workgroups that need action are identified by a red icon. A red icon means that the close reason is:

- Open for assessment– Intake complete and the Assessment workgroup has not been opened
- Open for case management– Intake complete and the Case management workgroup has not been opened, or
- Refer to current workgroup – Intake complete and the Intake workgroup has not been referred.



Warning: Once the Intake workgroup is saved after the Disposition/Close section is completed, it is not editable. It is important to ensure all information is entered prior to closing it.

To Close an Intake Workgroup:



1. From **Intake Views**, select the Intake workgroup.
2. Click in the **Close Reason** field and select a close/disposition reason from the drop-down menu.
3. Select a close date from the **Close date/time** drop-down menu.
4. Click **Save**.

Editing a Closed Intake

A worker with Reset Errors security may re-open a workgroup for correction until either of the following occurs:

- Thirty (30) days has elapsed since an intake workgroup close date.
- An Intake workgroup initiates another workgroup.

Detaching a Referred Intake Workgroup from an Associated Workgroup

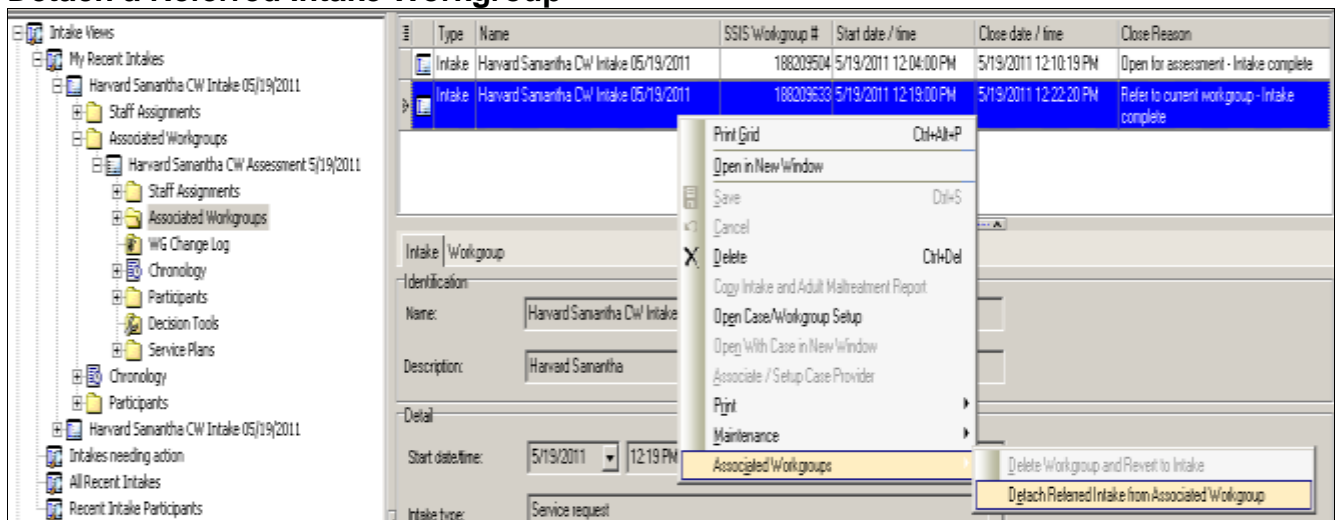
Intake workgroups may need to be detached from an associated Assessment or Case Management workgroup if the Intake workgroup is mistakenly associated with the wrong workgroup or the Intake workgroup was incomplete at the time it was associated. For example, some families have multiple workgroups open and an Intake workgroup may get associated with the wrong Assessment or Case Management workgroup. Workers also may need to add more data to an Intake that was already associated with an Assessment or Case Management workgroup.

Detaching a referred Intake workgroup can be completed from Intake Views or from Workgroup Searches. This can only be done within the first 30 days. Also, this does not delete the Intake Workgroup, the Assessment workgroup, or the Case Management workgroup with which it was associated.

The Detach Referred Intake from Associated Workgroup menu is enabled when the Intake workgroup is closed and the close reason used was Refer to current workgroup.

Once detached, the Intake workgroup displays in Intake Views and Searches, preceded by a red icon, meaning that it needs action.

Detach a Referred Intake Workgroup



To Detach a Referred Intake Workgroup:

1. Select the Assessment or Case Management workgroup into which the Intake workgroup is referred.
2. Expand the Tree View and select the **Associated Workgroups** folder.
3. Select the Intake workgroup in the grid. This is the one with a Close Reason of Refer to current workgroup-Intake complete.
4. Access the **Action** menu and select **Associated Workgroups – Detach Referred Intake from Associated Workgroup**.
5. Click on **Yes** in the **Detach** dialog box.

Deleting and Reverting to Intake

Another option is to delete a workgroup and revert to the Intake workgroup. Agencies can delete the Assessment and Case management workgroups and revert back to an Intake workgroup if there were errors in the Intake that the agency needs to correct, or the wrong program was selected on the Intake. For example, the Intake was created using Child Care General as the program, instead of Child Welfare General.

Deleting and reverting to an Intake workgroup can be completed from either Intake Views or Searches, or from My Caseload.

The Delete workgroup and Revert to Intake menu is not enabled when:

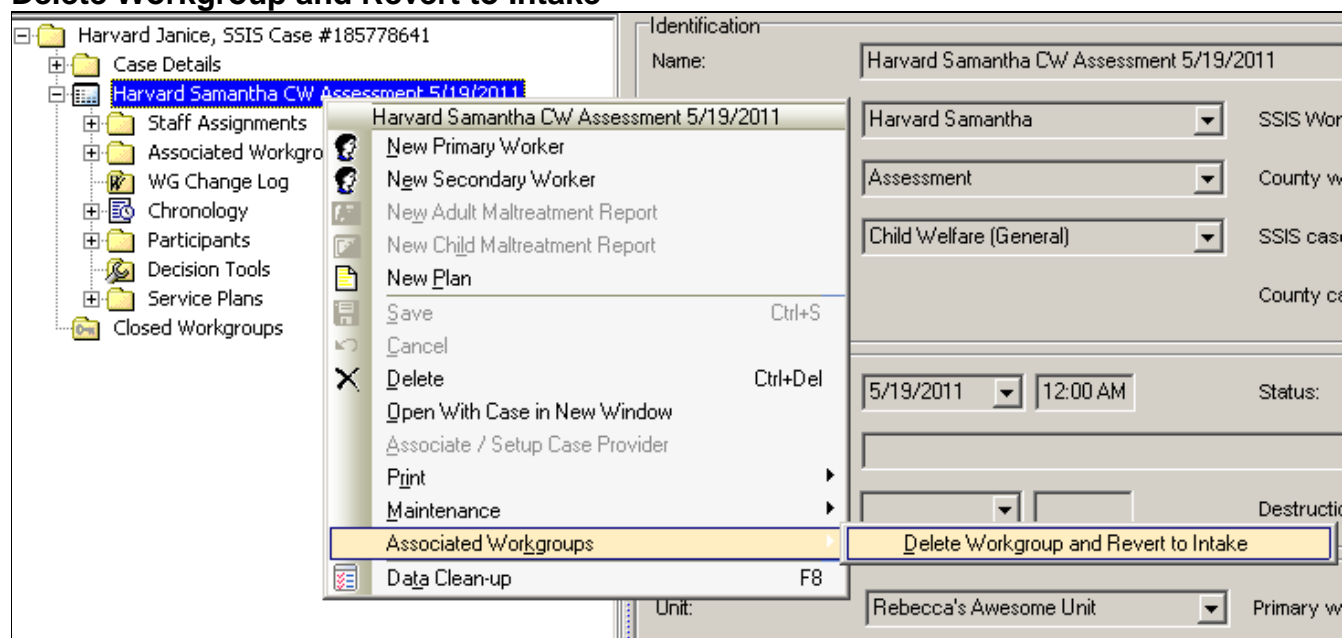
- Multiple Intake Workgroups are associated with an Assessment or Case Management workgroup.
- A Child Maltreatment Report is attached to the workgroup, and maltreatment determinations or conclusions exist.
- Delete Workgroup and Reset Errors functions are not assigned in Administration
- A payment is associated with the workgroup.
- A child ward record is associated with a workgroup.



Warning: Chronology is deleted with the Assessment or Case Management workgroup.

If the chronology must be saved, create a new workgroup and send a request to the SSIS Data Fix team at dhs.ssisdata@state.mn.us to transfer the chronology before using the Delete Workgroup and Revert to Intake function.

Delete Workgroup and Revert to Intake



To Delete a Workgroup and Revert it to Intake:

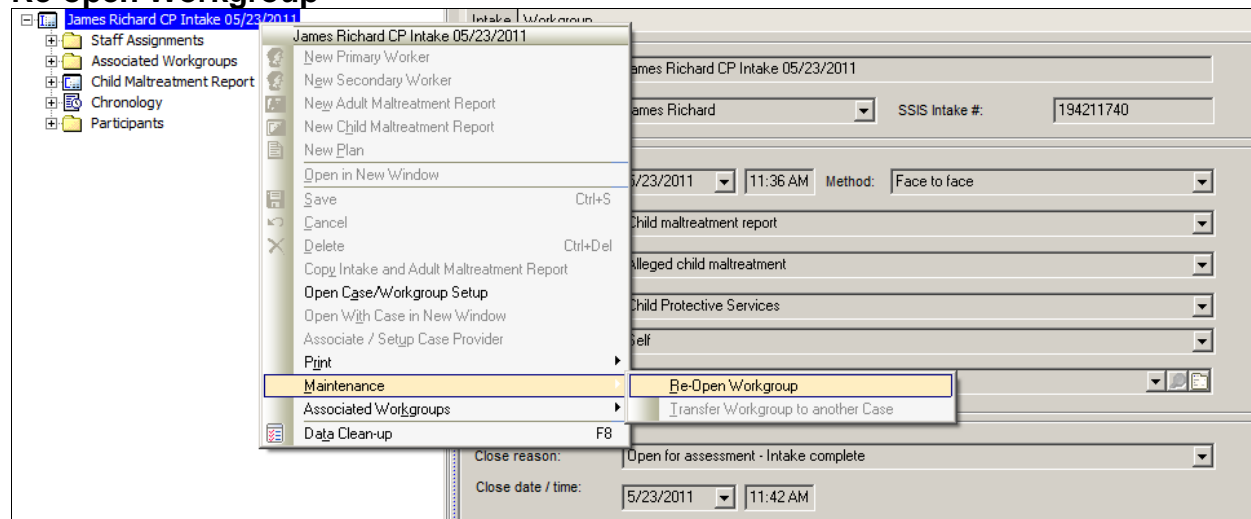


1. Right-click on the applicable Assessment or Case Management workgroup.
2. Select **Associated Workgroups**.
3. Select **Delete Workgroup and Revert to Intake**.
4. Click **OK** in the dialog box to continue.
5. Click **OK** to confirm the "Workgroup has been deleted."
6. Click the **Refresh** button on the Tree View toolbar.
7. Click the **Intake Search** button on the SSIS toolbar.
8. Select the **Intakes needing action** node in the Tree View.
9. Click the **Refresh** button on the Tree View toolbar.
10. The reverted intake displays.

Re-open the Intake

Use the maintenance option of Re-open workgroup to re-open an Intake that was closed in error and not yet associated with an Assessment or Case Management workgroup.

Re-open Workgroup



To Re-open the Intake:



1. Select the Intake workgroup and access the **Action** menu.
2. Select **Maintenance**.
3. Select **Re-Open Workgroup**.
4. Click **Yes** to the warning message, "Are you sure you want to Re-open this Closed Workgroup?"
5. Continue work as needed in the selected intake workgroup.

References

Adult Maltreatment Module

http://www.dhs.state.mn.us/main/groups/agencywide/documents/pub/dhs16_144874.pdf

Child Maltreatment Report Module

http://www.dhs.state.mn.us/main/groups/agencywide/documents/pub/dhs16_166003.pdf

Intake Searches Tutorial

http://www.dhs.state.mn.us/main/groups/agencywide/documents/pub/dhs16_163946.pdf